myCalPERS Employer Reports (Cognos)

Student Guide

December 7, 2024



myCalPERS Employer Reports (Cognos)

myCalPERS generates reports using IBM Cognos software. Cognos queries your agency's data in myCalPERS and generates predefined reports with your chosen criteria in different formats.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

Your myCalPERS access roles determine which report you can run. If you are unable to run a report, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the <u>Introduction to myCalPERS for</u> <u>Business Partners (PDF)</u> student guide.

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myCalPERS Employer Reports Resources

myCalPERS Employer Reports (Cognos) Catalog

The <u>myCalPERS Employer Reports (Cognos) Catalog</u> provides a list of available reports, samples of the reports, descriptions, and user role needed to generate each report.

You can also filter reports by one of the following report types:

- Benefits
- Contributions
- Enrollments
- Financials
- Health
- Payroll
- Retirement Contracts
- Retirement Enrollments
- System Access Administration

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

Internet Browsers & Configuration

The <u>IBM Cognos Analytics</u> page provides a complete list of internet browsers that support IBM Cognos Analytics, including the version and additional information.

Pathway: IBM Cognos Analytics website > Supported Software tab > Web Browsers section (bottom of page)

IBM Cognos Analytics uses default browser configurations, but additional setting configurations may be required. Visit the <u>IBM Brower Settings</u> page for details.

Pathway: IBM Cognos Analytics website > Search: browser requirements > Version: 11.0

myCalPERS System Access Administration Student Guide

The <u>myCalPERS System Access Administration (PDF)</u> student guide provides your system access administrator(s) the steps to maintain your agency's system access necessary to run reports.

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > myCalPERS System Access Administration (PDF)

Scenario 1: Manage My Content

Within the My content folder, you will add folders and subfolders, and rename and delete folders and reports.

Step Actions (16 steps)

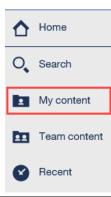
Step 1 From the homepage, select Common Tasks from the left-side navigation.

Common TasksImage: Common TasksMenuImage: Common TasksPerson SearchContact PersonalSecurity Settings

Step 2 Select the **Reports** left-side navigation link.



Step 3 From the left-side navigation, select the My content folder.



Add Folder

Step 4 Select the New folder icon.

	My content	Ο Υ ↑
Step 5	Select the Folder button.	
Step 6	Enter a name for your fold	er.
Step 7	Press the Enter key on you	r keyboard.

Add Subfolder

Step 8	From the My content folder, open the folder where you will add a subfolder.		
Step 9	Repeat steps 4-7.		
Delete Step 10	From the My content folder, select the More icon next to the item. Fiscal Year 23-24 11/1/2023 10:26 AM		
Step 11	Select Delete.		
Step 12	Select the OK button.		
Rename Step 13	From the My content folder, select the More icon next to the item. Fiscal Year 23-24 11/1/2023 10:26 AM		
Step 14	Select Properties.		
Step 15	Select the Edit (pencil) icon. Fiscal Year 23-24 Owner Business P 245 Created: 11/1/2023 10:26 AM Modified: 11/1/2023 10:26 AM Type: Folder		
Step 16	Update the name of the item.		
	You have completed this scenario.		

Scenario 2: Run Reports

You will run a report, change the format, save, and then locate the saved report.

System Logic

To re-run a report within the same session, update the report criteria (refer to scenario 3).

Step Actions (16 steps)

Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



Step 3

From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

Run Report

Step 5	Select the report name link.	
Step 6	Complete the report criteria.	
Step 7	Select the Finish button.	

Change Report Format

Step 8 Do you want to run the report in a different format?

Yes: Select the Run as icon in the top left corner of the page.



No: Skip to step 10.

Step 9	Select a format.
	Run HTML
	Run PDF
	Run Excel
	Run Excel data
	Run CSV
	Run XML

Save Report

Step 10 Do you want to save the report? **Yes**: Select the Add this report icon in the top left corner of the page. lacksquare.... No: You have completed this scenario. Step 11 Select Save this report as report view.... Step 12 If desired, rename the report. Save as report view Help 🛞 Specify a name and location for this entry. A report view shares the same report specification as the source report. Name: Report View of Arrears Receivable Detail Report × Location: None Select another location... Select My Folders OK Cancel Step 13 Choose the Select My Folders link. Select the **OK** button. Step 14

Locate Saved Report

Step 15 From the left-side navigation, select the My content folder.

	You have completed this scenario.	
Step 16	Select the link for the saved report to display it.	
	Recent Recent	
	Team content	
	My content	
	O Search	
	Home	

Scenario 3: Update Report Criteria

You will update the criteria of a report that is saved in your My content folder.

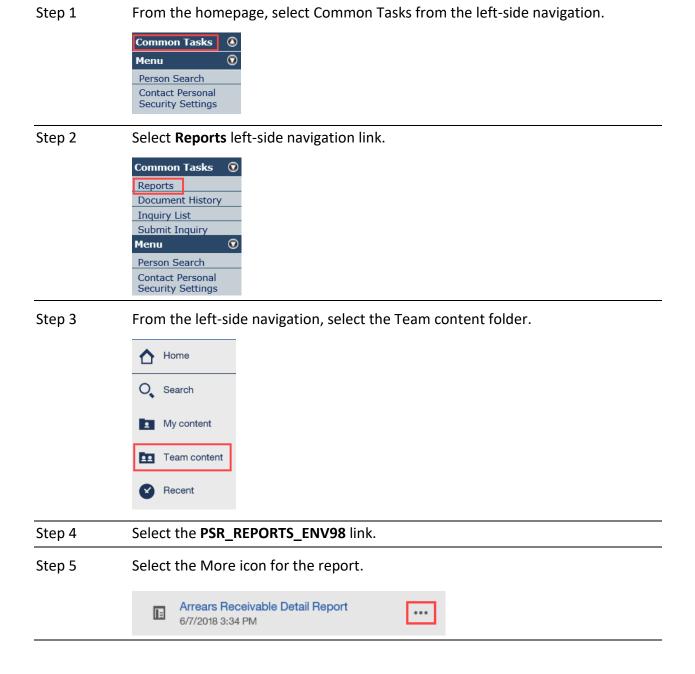
Step Actions (7 Steps)

Step 1	From the left-side navigation, select the My content folder. Home Search My content Team content Recent
Step 2	Select the link for the saved report.
Step 3	Select the Run as icon in the top left corner of the page.
Step 4	Did the criteria page display?
	Yes: Skip to step 6. No: Continue to step 5.
Step 5	If the criteria page doesn't display, select Reset prompts and run.
	Run HTML
	🔁 Run PDF
	Run Excel
	🔒 Run Excel data
	Run CSV
	Run XML
	Reset prompts and run
Step 6	Complete the report criteria.
Step 7	Select the Finish button.
	You have completed this scenario.

Scenario 4: Run Reports in Different Formats

You will run a report in a format other than HTML (default).

Step Actions (10 Steps)



Step 6	Select Run as.	
	View versions	
	🛬 Properties	
	Copy or move	
	Create shortcut	
	> Embed	
	< Share	
Step 7	Select a report format.	
	Run as	

	Run in background	
	◯ Excel	
	O Excel Data	
	HTML	
	⊖csv	
	⊖ XML	
	✓ Prompt me	
Step 8	Select the Run button at bottom right.	
Step 9	Complete the report criteria.	
Step 10	Select the Finish button.	
	You have completed this scenario.	

Scenario 5: Create Report View (Shortcut)

You will create a shortcut to run a report.

System Logic

Do not use the Create Shortcut option as it may stop functioning over time.

Step Actions (14 steps)

Step 1 From the homepage, select Common Tasks from the left-side navigation.

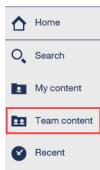


Step 2 Select **Reports** left-side navigation link.



Step 3

From the left-side navigation, select the Team content folder



- Step 4 Select the **PSR_REPORTS_ENV98** link.
- Step 5 Select the More icon for the report.



Step 6 Select Create report view.

Step 7	Select the My content folder in the upper left. Save as	
	Team content > PSR_REPORTS_ENV96	
	1959 Survivor Billing Validation Member Report	
Step 8	You can either save the shortcut in your My content folder or select one of the folders you created.	
Step 9	Tip: At the bottom, we recommend renaming the report with Shortcut in the title to help differentiate between a shortcut to a report and a report.	
	Destination: PSR_REPORTS_ENV96 Save as: Shortcut - Arrears Receivable Detail Report	
Step 10	Select the Save button.	

Locate and Run Saved Report

Step 11 From the left-side navigation, select My content.

♪	Home
0	Search
.	My content
•	Team content
Ø	Recent

Step 12	Select the link for the saved report.
Step 13	Complete the report criteria.
Step 14	Select the Finish button.
	You have completed this scenario.

Scenario 6: Run in the Background

Large reports may take additional time to run. You will run a report in the background, allowing you to use Cognos while the report is generated.

Step Actions (27 steps)

Locate Report

Step 1

p 1 From the homepage, select Common Tasks from the left-side navigation.

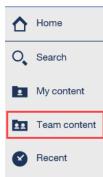


Step 2 Select **Reports** left-side navigation link.



Step 3

From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Select the More icon for the report.



Step 6	Select Run as.		
	E View versions		
	ি Copy or move		
	Create shortcut		
	Embed		
	ଙ୍କୁ Share		
Step 7	Turn on Run in background.		
	Run in background		
Step 8	Select Advanced to expand the section.		
	Advanced Y		
Step 9	Select the Classic view link.		
	Advanced ^		
	Now CLater		
	Languages >		
	Delivery >		
	Classic view		
Step 10	Within the Run with options section, select the advanced options link.		
	Run with options - Contribution Summary for a Fiscal Year Report Help 🛞		
	Format: HTML To specify a time to run the report, or for additional formats, languages, or delivery options, use advanced options.		
	Accessibility:		
	Language: English V		
	Delivery: Over the report now		
	Print the report: Printer location:		
	Prompt values:		
	No values saved Prompt for values		
	Run Cancel		

Step 11 Within the Time and mode sub-section, select the **Run in the background** radio button.

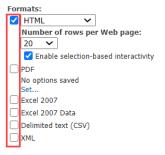
Time and mode:	
O View the report now	
Run in the background:	
Now	
🔾 Later:	
Apr 2, 2021	•
11:30 AM	•

Step 12 Select either the **Now** or **Later** radio button.

Time and mod	e:	
O View the reprint of the second s	port now	
Run in the l	oackground:	
Now Later:		
Apr 2	, 2021	•
11 :	30 AM	* *

Step 13 If you selected the **Later** radio button, enter a date and time for the report to run.

Step 14 Within the Formats sub-section, select the check boxes for the format(s).



Note: There may be additional features available within each available format.

Step 15 Within the Delivery sub-section, select the **Edit the save options...** link.



Note: Do not change the delivery method to print or email.

Step 16 Within the Save as report view section, enter your report name.



Step 17 Select the **OK** button.

Step 18 Select the **Run** button.

Report Criteria

Step 19	Enter the criteria for the report.	
Step 20	Select the Finish button.	
Step 21	Select the OK button.	

Locate Generated Report

Step 22 From the left-side navigation, select the My content folder.

	Q Search
[My content
	Team content
	Recent Recent
Step 23	Did you select more than one format?
Y	Yes: Continue to step 24.
I	No: Select the report link. You have completed this scenario.
Step 24	Select the More icon for the report.
	Contributions Report 4/2/2021 11:09 AM

Step 25	Select View versions.		
	Run as		
	View versions		
	net test test test test test test test t		
	Create shortcut		
	≪ Share		
	Delete		
Step 26	Select the Date link.		
	Apr 2, 2021 11:09 AM		
Step 27	Select the format you wish to display.		
	Apr 2, 2021 11:09 AM		
	EN 💼 👼 🗾		
	You have completed this scenario.		

Scenario 7: Schedule Reports

You will run a report and save it within your My content folder. From there you will:

- Set a recurring schedule
- View versions
- Update schedule
- Delete schedule

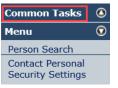
System Logic

- To set a schedule for a report, it must first be run and saved within the My content folder.
- Only one schedule can be associated with each entry.
- All schedules must have an end date to properly run.

Step Actions (39 steps)

Run

Step 1 From the homepage, select Common Tasks from the left-side navigation.

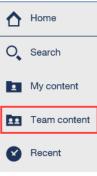


Step 2 Select **Reports** left-side navigation link.

	Common Tasks 💿
	Reports
	Document History
	Inquiry List
	Submit Inquiry
	Menu 💿
ĺ	Person Search
ĺ	Contact Personal
ļ	Security Settings

Step 3

From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5	Select the report link.
Step 6	Complete the report criteria.
Step 7	Select the Finish button.
Save	
Step 8	Select the Add this report icon in the top left corner of the page.
Step 9	Select Save this report as report view
Step 10	If desired, rename the report. Save as report view Help © Specify a name and location for this entry. A report view shares the same report specification as the source report. Name: Report View of Arrears Receivable Detail Report Location: None Select another location Select My Folders

Step 11 Select the Select My Folders link.

Step 12 Select the **OK** button.

Set Schedule

Step 13 From the left-side navigation, select My content.

ᡎ	Home
0	Search
•	My content
•	Team content
♥	Recent

Step 14 Select the More icon for the saved report.



Step 16	Select the Schedule tab.		
	Participant Appointment Details Report		
	Owner Created: 6/11/2018 9:03 AM Super User Modified: 6/11/2018 12:15 PM Type: Report View		
	General Report Schedule Permissions		
Step 17	Select the New icon.		
	General Report Schedule Permissions		
	(+) New		
Step 18	From the Schedule drop-down list, choose Daily, Weekly, Monthly, or Yearly.		
Step 19	Under the Period section, you can change the start or end date (always have an end date).		
	Note: Do not select the <i>No end date</i> check box.		
Step 20	Optional: Under the Options section, select the HTML format icon to choose		
	other formats for the report. Within the Format panel, select the format check		
	box(es), and then select the Done button.		
Step 21	Under the Options section, confirm that the Delivery method is Save and the		
	correct prompts (criteria) are selected/entered.		
Step 22	Select the Create button.		
View Vers	sions		

Step 23 From the left-side navigation, select My content.

☆	Home
0	Search
1	My content
•	Team content
Ø	Recent

Step 24 Select the More icon for the saved report.

Step 24	Select the More icon for the saved report.
	Arrears Receivable Detail Report 6/7/2018 3:34 PM
Step 25	Select View versions.
Step 26	Under the Versions tab, select the blue date link.
Update Sch	edule
Step 27	From the left-side navigation, select My content.
	Home
	O Search
	My content
	Team content
	Recent Recent
Step 28	Select the More icon for the saved report.
	Arrears Receivable Detail Report 6/7/2018 3:34 PM
Step 29	Select Properties.
Step 30	Select the Schedule tab.
	Participant Appointment Details Report
	OwnerCreated:6/11/2018 9:03 AMSuper UserModified:6/11/2018 12:15 PMType:Report View
	General Report Schedule Permissions
Step 31	Select the right arrow for the schedule.
Step 32	Update the schedule.

Step 33Select the Update button.

Delete Schedule

Step 34	From the left-side navigation, select My content. Image: Home Image: Recent
Step 35	Select the More icon for the saved report. Arrears Receivable Detail Report 6/7/2018 3:34 PM
Step 36	Select Properties.
Step 37	Select the Schedule tab. Image: Comparison of the select term of te
Step 38	Select the Delete button.
Step 39	Select the OK button.
	You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the <u>CalPERS website</u> at www.calpers.ca.gov.

- <u>myCalPERS Student Guides & Resources</u>
 Pathway: CalPERS website > Employers > I Want To...: Find myCalPERS Student Guides
- <u>Business Rules & myCalPERS Classes</u>
 Pathway: CalPERS website > Employers > I Want To...: Attend Training & Events > Business Rules & myCalPERS Classes
- <u>myCalPERS Technical Requirements</u>
 Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- <u>System Access Administrators</u>
 Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

CalPERS Contacts

Email

- To contact <u>employer educators</u> for questions and requests, email calpers_employer_communications@calpers.ca.gov.
- To contact the <u>Employer Response Team</u> for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-**225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the Common Tasks left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.

Report Requests

In the event a Cognos report does not provide the information you need, you may request a custom report. Allow 6-10 weeks to fulfill each request. Additional paperwork and approval may be required for each request.

- For payroll or retirement reports, email <u>employer technical support@calpers.ca.gov</u>.
- For health reports, email <u>hamd_data_services@calpers.ca.gov</u>.